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# **The World Market for Turbine Flowmeters, 2<sup>nd</sup> Edition**

## **Overview**



**Date Published: January 2012**

[www.flowturbine.com](http://www.flowturbine.com)



## The World Market for Turbine Flowmeters, 2<sup>nd</sup> Edition

There's some good news for the turbine flowmeter market as well as some challenges, according to a new market study by Flow Research, **The World Market for Turbine Flowmeters, 2<sup>nd</sup> Edition**. We discovered that the market is indeed alive and well.

The turbine flowmeter market has been essentially flat for the past 10 years, not declining, as some experts predicted, although Coriolis, ultrasonic, and magnetic meters have expanded substantially, decreasing turbine meter's total market share. At the same time, turbine meter suppliers have made technology improvements to make turbine meters more reliable and effective, and the installed base remains large enough to encourage substantial development. Turbine flowmeters also retain a price advantage over new-technology competitors.

The primary goal of this study was to determine the size of this market in 2011, including forecasts through 2016. We also achieved these goals:

- Determine the worldwide market size for turbine flowmeters and provide this data for individual geographic regions by turbine flowmeter type
- Forecast market growth through 2016 for all of the significant technology types used in this market
- Determine market shares for the leading suppliers of the turbine flowmeter market
- Identify the process industries and core applications where turbine flowmeters are used
- Identify market growth sectors
- Analyze products for the main companies selling into the turbine flowmeter market
- Determine average selling prices for turbine flowmeters by region and meter type
- Outline strategies for manufacturers to sell into the turbine flowmeter market
- Create company profiles of the main suppliers into the turbine flowmeter market
- Provide product shipment data by distribution channel and customer type
- And much more

### Why Flow Research?

- We specialize in flowmeter markets and technologies
- We have researched all flowmeter types
- We study suppliers, distributors, *and* end-users
- Our worldwide network of contacts provides a unique perspective
- Our mission is to supply the data to help your business succeed

## **Rationale for Study**

Flow Research has focused exclusively on the study of process control technologies and instrumentation since its inception. Over the last ten years, our research has resulted in the publication of more than 100 comprehensive market studies that have covered the following subject areas: all fourteen existing flowmeter technologies, temperature sensors and transmitters, pressure sensors and transmitters, and API valves. We have also conducted studies of specific flow applications such as gas flow, steam flow, water, and wastewater. Turbine flowmeters are undergoing immense competitive pressure from more recently invented flowmeter technologies, yet remain a solid choice within several basic applications in today's modern process control environment. We are pleased to have the opportunity to update the information on this important market.

Flow Research uses the perspective of all three segments – manufacturer, distributor/representative, and end-user – when analyzing target markets. We maintain regular communication with all three of these groups in order to be best positioned to note both subtle and significant shifts in technologies or buying patterns. We also use this steady flow of new information in support of our two quarterly publications, *Market Barometer* and *Energy Monitor*. (see: [www.worldflow.com](http://www.worldflow.com)).

This has proved optimal time to assess the turbine flowmeter market.

## **The Founding Sponsor Program**

Here at Flow Research, our primary focus is to develop and to make available to you the data that will help your business make informed decisions. The best decisions are most often made with the best information being available at the right time. Thus, we believe it is vital to know what information we must develop in order to best assist our clients, and to continually update this information to maximize its usefulness.

The above is the basic idea behind the *Founding Sponsor Program*. Founding Sponsors have the best opportunity to influence the actual areas of research we will cover in each study. Founding Sponsors receive periodic progress updates as a study is completed. And, Founding Sponsors also receive a sizable discount once the research is ready for publication.

To learn more about the Founding Sponsor Program, please see page seven of this overview.

## **Key Issues Addressed in the Study**

There has been significant new capital projects growth in large regional economies such as India and China during the last decade. Our research determines where growth is occurring – and where it is not – in terms of application, industry, and geography. The results of this study reveal where the highest returns should be expected to occur through 2016 in these three basic market segments.

The box below highlights some of the areas that you may find of greatest interest. They also comprise the basic building blocks of this study.

### **Key Issues Addressed**

This study addresses the key issues in the turbine market today, including:

- What is the technological state of the market today?
- What applications are growing – and which are not?
- What regions of the world hold the greatest growth prospects – and why?
- Are there new competing technologies to the traditional devices – and what are they?
- Are there new measurement standards that must be understood?
- What technical developments are occurring in turbine flowmeters?
- Which industries represent the greatest growth potential – and why?
- What are the features that end-users are looking for in turbine flowmeters?

The research segmentation is listed in the following pages.

## **Study Segmentation**

### **Geographic Regions**

- North America (United States and Canada)
- Europe, including Central and Eastern Europe, and FSU
- Japan
- China
- Rest of Asia
- Rest of World (Mideast/Africa, and Latin America)

### **Technology Types**

- Axial
- Single Jet
- Multi-Jet
- Paddlewheel
- Pelton Wheel
- Propeller
- Woltman
- Compound
- Fire Service
- Other

### **What's in this for my company?**

- See the emerging applications and where the growth is
- Understand world and regional markets
- Get to know your real competition
- Learn what other suppliers manufacture, where, and for whom
- The best information creates the best decisions

### **Bearing Material**

- Stainless Steel
- Tungsten Carbide
- Hard Carbon
- Ceramic
- Teflon
- Other

**Application Types**

- Water and Wastewater
- Municipal and Industrial Gases
- Oil
- Industrial Liquids

**Mounting Types**

- Insertion
- Inline

**Industries**

- Oil & Gas (Production and Transportation)
- Refining
- Commercial/ Industrial Gas Utility
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Electric Power
- Water & Wastewater
- District Energy
- Aerospace
- Other

**Supplier Market Size and Market Shares**

- Provided for each technology type
- Forecast information through 2016

**Sales by Distribution Channel**

- Direct Sales
- Independent Representatives
- Distributors
- E-Business

**Sales by Customer Type**

- End-Users
- OEMs
- Systems Integrators
- Engineering and Consulting Firms

**Line Sizes**

- >0 – 4 inches
- >4 – 8 inches
- >8 – 12 inches
- >12 –20 inches
- >20 inches

**Fluid Types**

- Liquid
- Gas
- Steam

**Comprehensive Company Profiles and Product Analyses will include the following companies:**

- Aichi Tokei Denki
- Arad
- Badger Meter/Cox
- Bopp & Reuther
- Burkert
- Cameron
- Daniel (Emerson Process)
- Elster-Instromet
- Faure Herman (IDEX Corp.)
- Flow Technology (Roper)
- FMC Technologies
- GF Signet
- Hoffer Flow Controls
- Liquid Controls (IDEX Corp)
- McCrometer (Danaher)
- Neptune Technology Group (Roper)
- RMG (Honeywell)
- Satam
- Sensus
- Sponsler (IDEX Corp.)
- Thermo Fisher Scientific
- And many more

## Strategies for Success

- Discussion of market forces at work
- Factors contributing to and limiting growth
- Strategic action perspectives
- Real world success stories

## Publication Date

The target date for publication of this study is January 2012.



## Background

Dr. Jesse Yoder is President of Flow Research Inc., a company he founded in 1998. Dr. Yoder has 24 years of experience as a writer and an analyst in process control and instrumentation. Since 1990, he has written more than 120 market research studies, most of them regarding flow and instrumentation. A selection of recent and scheduled Flow Research studies is as follows:

- |       |  |              |
|-------|--|--------------|
| I.    | The World Market for Coriolis Flowmeters, 4 <sup>th</sup> Edition              | (Q1/2012)    |
| II.   | The World Market for Magnetic Flowmeters, 4 <sup>th</sup> Edition              | (5/2009)     |
| III.  | The World Market for Ultrasonic Flowmeters, 4 <sup>th</sup> Edition            | (Q1/Q2 2012) |
| IV.   | The World Market for Vortex Flowmeters, 4 <sup>th</sup> Edition                | (7/2010)     |
| V.    | The World Market for Diff. Pressure Flowmeters and Primary Elements            | (1/2007)     |
| VI.   | Worldwide Survey of Flowmeter Users, 2 <sup>nd</sup> Edition                   | (1/2006)     |
| VII.  | The World Market for Positive Displacement Flowmeters, 2 <sup>nd</sup> Edition | (1/2012)     |
| VIII. | The World Market for Turbine Flowmeters, 2 <sup>nd</sup> Edition               | (1/2012)     |
| IX.   | The World Market for Pressure Transmitters, 3 <sup>rd</sup> Edition            | (8/2011)     |
| X.    | Volume X: The World Market for Flowmeters, 4 <sup>th</sup> Edition             | (Q2/2012)    |
| XI.   | The World Market for Gas Flow Measurement, 2 <sup>nd</sup> Edition             | (Q3/2011)    |
| XII.  | The World Market for Steam Flow Measurement                                    | (3/2008)     |
| XIII. | The World Market for Mass Flow Controllers, 2 <sup>nd</sup> Edition            | (Q1/2012)    |
| XIV.  | The World Market for Thermal Flowmeters  | (10/2009)    |
| XV.   | The World Market for Liquid Analytical Instruments                             | (2/2011)     |

The above studies are described at [www.flowstudies.com](http://www.flowstudies.com).



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*Blaise Pascal*

## **The Flow Research *Founding Sponsor Program***

To produce studies that most closely match our clients' needs, Flow Research instituted the Founding Sponsor Program. This program enables companies who wish to participate at a high level in a study's research to influence its scope and segmentation. In addition, Founding Sponsors receive regular updates from Flow Research on study progress, and receive a significant discount on the regular price of the study.

Procedure: Early in the planning phase of a study, Founding Sponsors receive a proposal that includes the proposed segmentation. Founding Sponsors can propose additional segmentation, and can also suggest changes to the proposed segmentation. While the decision to adopt particular segmentation ultimately lies with Flow Research, and is based on input from all contributors, we will do our best to accommodate the specific needs of each of our clients.

During the research phase of a study, Flow Research will issue regular reports that provide updates on the progress of the research. These reports will be sent to Founding Sponsors, who are then invited to provide any additional input or comments into the study.

Being a Founding Sponsor requires making an early commitment to purchase the study. However, in return, Founding Sponsors receive a significant discount off the regular price of the study. Payment can be made either in one amount at the beginning of the study, or split into two, with the second payment due upon delivery of the study.

For additional details, or to find out how the Founding Sponsor program would help your firm, please contact Flow Research. We look forward to working with you!

If you have any questions about the Founding Sponsor program, please contact Norm Weeks at +1 781 245-3200, or [norm@flowresearch.com](mailto:norm@flowresearch.com).

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- We specialize in flowmeter markets and technologies.
- We research both new-technology and traditional technology flowmeters.
- We contact every known supplier for each study.
- We have data on the flowmeter markets going back to 1992 and have been actively following them since then.
- We offer our studies in both electronic and color-printed hardcopy format.

[www.flowturbine.com](http://www.flowturbine.com)